North Central Indiana Referral Protocol 1

1. Ensure customer understands and is agreeable to the referral.
2. Contact the other agency to identify a person's name and number to refer the individual to.
3. Complete either the generic interagency referral form or your own agency's form electronically or in hard copy.
4. E-mail or fax a copy to the agency staff person to which the individual is being referred.
5. Make a copy of the referral for the customer to take with him/her.
6. Keep a copy for your own file for at least 2 months.
7. When you receive a referral by e-mail or fax, keep a copy of the referral for at least 2 months.
8. If the customer actually comes to see you, record the date and the result (e.g., enrolled, assistance provided, referred elsewhere, etc.) and fax or e-mail back to the originator.

Phase 1 Tracking

1. Enter a tally mark by the appropriate agency name on the monthly log. There is space for additional agencies to be added as needed.
2. On the last working day of each month, add up the number of tally marks for each agency and turn into the contact person designated for your agency.
3. The designated person in each agency will total all staff's referrals by agency and provide one summary sheet of the grand totals by agency to______________________________________ by the 15th day of the following month.
4. By the last day of the month, ___________________________will complete the referral matrix for the previous month showing the number of referrals taking place among the agencies.
5. On a quarterly basis, _______________________ will convene the partners to discuss:
   - What patterns are we seeing in terms of major referral relationships?
   - Are there differences from month to month, or is the pattern fairly consistent?
   - What implications do these referral relationships have for:
     - Future collocations, itinerant staffing, or other accessibility enhancements
     - Staff cross training
     - Partnerships – what partnerships need to be developed or strengthened?
   - How do we improve this process? What more do we need to know?

Phase 2 Tracking

After baseline tallies have identified where the heaviest referrals occur, each agency should select the top 3 agencies it refers to for Phase 2 tracking.

1. Each staff person should maintain a log sheet for each of the top three agencies referred to.
2. Each time a referral is made, enter the client's name and the date the referral was made.
3. If you receive confirmation back that the customer was seen, record the date and the time lapse in days between when the customer was referred and when he/she was seen.
4. Record the result (e.g., enrolled, served, referred elsewhere).
5. On the last working day of the month, provide the logs to your agency's designated person for the *previous* month. That is, on the last working day of October, you would provide the logs for the month of September. This is to allow time for all clients who were referred in a given month to make contact.
6. The designated person in each agency should total up the number who had been referred during the course of a given month, the number that were eventually seen, the average time lapse between referral and client being seen, and the number of each kind of result and provide the monthly reports to______________________
7. On a quarterly basis, _______________________ will convene the partners to discuss:
   - How many clients are we "losing" in the process of making referrals?
   - What do the average number of day between referral and client being seen say to us about our customers' behaviors and what we need to do to close the gap?
   - What implications do the results have for the quality of our referrals (i.e., if a large percentage were not served/enrolled after being seen, it may not have been an appropriate referral).
   - How can we improve the process?